

ALERT IIS Inventory Borrowing Handout

This is a companion guide to the ALERT IIS Inventory Borrowing Course.

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What is Borrowing?

- Borrowing is giving the wrong stock (funding source) of vaccine to a patient.
- ALERT IIS detects this by identifying mismatches between the funding source and the eligibility code used. Organizations that enroll in state-supplied vaccine programs must track and report any borrowing.
- ALERT IIS cannot distinguish between an incorrect eligibility code and a true instance of borrowing vaccine, only that the patient eligibility code and vaccine funding source are mismatched when an immunization is submitted.
- You can use the Ad Hoc List Report to find and review borrowing cases.

Eligibility Codes

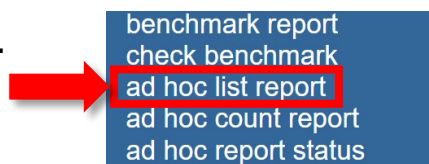
- Indicate why a patient is eligible for state-supplied vs. privately purchased vaccine.

- Indicate the funding source that patients are eligible to receive.
- Organizations receiving state-supplied vaccine must report every dose of vaccine given to patients with an eligibility code.
- **Public and private (VFC only vs. Vaccine Access Program) clinics use different eligibility codes from one another.**
- Review the [Vaccine Management Guide](#) for more on eligibility codes.

How to run the Ad Hoc List Report

The ALERT IIS Ad Hoc List Report creates a list of selected patients and details their immunizations by exporting the list into an Excel spreadsheet, you can sort and filter to get the most information about borrowing.

Step 1. Click “ad hoc list report”.



Step 2. Answer the question “What items would you like to display on the report?”

- Select **all items (8)** listed under “Most Common Items”.
- Select under “Immunization Items”
 - **“Borrowed Inventory”**
 - **“From Inventory”**
 - **“Inventory Funding Source”**
- Click “Add” to move the selected items across

A screenshot of the 'Create a Customized List Report' dialog box. The title is 'Create a Customized List Report'. Below it is the question 'What items would you like to display on the report?'. There are two lists of items. The left list, under 'Other Patient Items', includes: Vaccine Group, Active Status, County of Birth, County of Residence, Gender, Language Preference, Patient ID, and Patient Middle Name. The right list, under 'Immunization Items', includes: Vaccination Date, Vaccine, Vaccine Eligibility, Vaccine Lot, Historical Immunization, Borrowed Inventory, From Inventory, and Inventory Funding Source. The 'Immunization Items' list is highlighted with a red box. Between the lists are three buttons: 'Add >', '< Remove', and '< Remove All'.

***TIP* Use “Shift+Click” to select multiple consecutive items**

***TIP* Use “Ctrl+Click” to add to previously selected items**

Step 3. Skip the question "How would you like the report to be sorted?"

How would you like the report to be sorted?

Item to sort on (not sorted) Order ☐ First-to-Last ☐ Last-to-First

A report takes longer to run if you want it to be sorted.

Step 4. Answer the question "How would you like to filter the data?"

How would you like to filter the data?

Item to filter on Select "Vaccination Date" 1

Comparison AFTER 2

Value to compare to 12/01/2024 3

and 4

Add/Save Edit 5

Click "Add/Save Edit"

Selected Filters

Active Status EQUALS Yes
AND
Owned Immunization EQUALS Yes 4

Leave the preselected items

Edit
Remove
And/Or
Group
UnGroup

How would you like to filter the data?

Item to filter on Vaccination Date

Comparison AFTER

Value to compare to 12/01/2024

and

Add/Save Edit

Selected Filters

Active Status EQUALS Yes
AND
Owned Immunization EQUALS Yes
AND
Vaccination Date AFTER 12/01/2024 6

Your selections are added to "Selected Filters"

Click "Generate" 7

Generate Cancel

Edit
Remove
And/Or
Group
UnGroup

Step 5. Export the Ad Hoc Report to review in Excel.

- Click "Refresh" to manually update the "Status" column during "PROCESSING"

| Ad Hoc Report Status | | | | | |
|----------------------|-----------------------|---------------------|---------------------|-------------------------|------------------------|
| | | | | Refresh | Cancel |
| Report Type | Provider Organization | Started | Completed | Status | Row Count |
| LIST | ALERT CLINIC 4 | 12/17/2024 07:38 AM | 12/17/2024 07:38 AM | DONE | 1234 |
| LIST | ALERT CLINIC 4 | 12/24/2024 10:25 AM | | PROCESSING | 4921 |

- Click on the blue hyperlinked "List" when the status updates to "DONE"

| Ad Hoc Report Status | | | | | |
|----------------------|-----------------------|---------------------|---------------------|-------------------------|------------------------|
| | | | | Refresh | Cancel |
| Report Type | Provider Organization | Started | Completed | Status | Row Count |
| LIST | ALERT CLINIC 4 | 12/17/2024 07:38 AM | 12/17/2024 07:38 AM | DONE | 1234 |
| LIST | ALERT CLINIC 4 | 12/24/2024 10:25 AM | 12/24/2024 10:25 AM | DONE | 4921 |

- Click on "Export as a XLSX".

| Ad Hoc Report Results | |
|---|----------------------------------|
| What would you like to do with this report? | |
| Export as Text | Export as a XLSX |
| Report 24947 | |
| ALERT Immunization Information System Report generated on 12/24/2024 Report generated by Jessie Trainer ALERT CLINIC 4 - AL4444 - 001201 | |
| Filter conditions used for this report: | |
| Patients associated with Selected Organization(s) | |
| Active Status EQUALS Yes | |
| AND | |
| Owned Immunization EQUALS Yes | |
| AND | |
| Vaccination Date AFTER 12/01/2024 | |

Reading the Ad Hoc List Report

Use the 'Borrowed Inventory', 'From Inventory' and 'Inventory Funding Source' columns to detect borrowed vaccine.

- "Yes"/"No"/"null"
- "null" tells us a vaccine dose did not deduct from the ALERT IIS

| I | Borrowed Inventory | From Inventory | K Inventory Funding Source |
|--------|--------------------|----------------|-------------------------------|
| No | | Yes | PRIVATE |
| No | | Yes | STATE |
| No | | Yes | PRIVATE |
| (null) | | No | |
| No | | Yes | PRIVATE |
| No | Yes | | Yes |
| No | | Yes | STATE |

"Yes"/" No"

"PRIVATE"/"STATE
"/blank

When **Borrowed** is "(null)", **From Inventory** will be "No" and **Funding Source** will be blank.

Step 1. Determine the borrows. Filter and organize your spreadsheet to show those immunizations ALERT IIS tracked as borrowed and nulls.

"(nulls)": The lot number cannot be found in ALERT Inventory. Some possible reasons are:

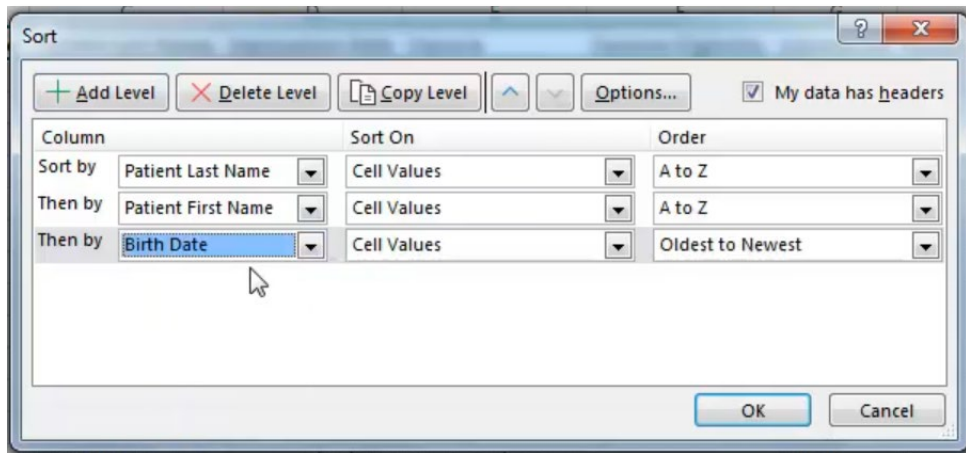
- The inventory was not added.
- An error occurred when entering the encounter in the patient record (or less often when entering inventory).
- If the lot is inactive and the clinic has not been corrected to active.

Refer to the [Inventory Deduction Tipsheet](#) for more information.

"Yes": Investigate to figure out whether this is showing as "yes" because the borrow occurred because the wrong funding source or wrong eligibility code was used.

Step 2. Address the borrows ("yes" and "nulls" you investigated and determined are borrows)

- i. Sort by "Patient Last Name", then by "Patient First Name", and then by "Birth Date".
- ii. Filter the "Borrowed Inventory" column. Remove "No" to leave **"(null)"** and **"Yes"** as the only visible result.



Step 3. Identify patients who received multiple vaccinations with:

- different eligibility codes, and/or
- different funding sources.

Step 4. Use the results to check:

- your clinic's vaccine borrowing log, and
- patient's insurance status to verify the correct eligibility code.

Examples

Private (VFC-only) Clinic False Borrow

At a private (VFC-only) clinic, a patient has received two vaccines. The patient was under 19 at the time of the vaccination. The vaccine eligibility for one of the vaccines was coded as "**B**" in error. This would not be a true borrow. Fix the eligibility code in the ALERT IIS patient record and in your EHR. ALERT IIS will still call this a borrow even though it has been fixed.

| Birth Date | Patient First Name | Patient Last Name | Vaccination Date | Vaccine | Vaccine Eligibility | Vaccine Lot | Borrowed Inventory | From Inventory | Funding Source |
|------------|--------------------|-------------------|------------------|-----------------|---------------------|-------------|--------------------|----------------|----------------|
| 1/22/2017 | ADDISON | ABSHERE | 7/24/2018 | DTaP | M | 2N43Z | No | Yes | STATE |
| 1/22/2017 | ADDISON | ABSHERE | 7/24/2018 | HepA-Ped 2 Dose | B | B2JH7 | Yes | Yes | STATE |
| 7/27/2018 | KINSLEY | ABLE | 8/17/2018 | DTaP-HepB-IPV | M | 33PA4 | No | Yes | STATE |

Public (VAP) Clinic False Borrow

At a public (VAP) clinic, an adult patient is immunized with PCV13 and flu on the same day. The clinician correctly entered the PCV13 as "B". However, the clinician also incorrectly entered the Flu dose as "B" when it should have been "L". This would not be a true borrow. Fix the eligibility code in the ALERT IIS patient record and in your EHR. ALERT IIS will still call this a borrow even though it has been fixed.

| | B | C | E | F | I | J | K |
|----|-------------------|-------------------|-----------------------------|---------------------|------------------|--------------|-------------------|
| 1 | Patient First Nam | Patient Last Name | Vaccine | Vaccine Eligibility | Borrowed Invento | From Invento | Inventory Funding |
| 16 | WENDY | AMIRI | Flu high dose pfree | L | No | Yes | PRIVATE |
| 17 | WENDY | AMIRI | PCV13 | B | No | Yes | STATE |
| 18 | WILLIAM | ANAYA | Flu high dose pfree | B | Yes | Yes | PRIVATE |
| 19 | WILLIAM | ANAYA | PCV13 | B | No | Yes | STATE |
| 20 | ABDULATIF | ZURITA LOPEZ | Flu quadrivalent injectable | L | No | Yes | PRIVATE |
| 21 | ABDULATIF | ZURITA LOPEZ | Varicella | B | No | Yes | STATE |

Repaying Borrowed Vaccine

Vaccine can be intentionally or unintentionally borrowed. The borrowed and repaid vaccine can have the same or different lot numbers. Actual, true borrows need to be paid back. Miscoding should be fixed but does not require paying back. All true borrows must be on the borrowing log.

Intentional Borrowing

- Happens when a clinic runs out of vaccine from a specific funding source and the clinic uses a dose from a different supply.
- These should be recorded in the borrowing log as they happen.
- The dose should still be reported with the patient's correct eligibility code.
- Once a new vaccine shipment arrives, the Ad Hoc List Report is compared to the borrowing log to see if there are also unintentional borrows.
- The borrowed dose is then paid back and recorded in ALERT IIS.

Unintentional Borrowing

- Happens when a vaccine is given from the wrong funding source by mistake.
- It should still have been reported with the correct patient eligibility, but the funding source won't match.
- It must be paid back just like intentional borrowing.
- These mistakes can be found using the Transaction Report or Ad Hoc List Report.

Tips for checking:

- If some but not all vaccines given to the same patient on the same day show borrowing, there may be an error.
- Check inventory to see if the correct funding source was available at the time by looking at the Show Transactions feature and running it for the single lot number-funding source combo.

Same lot numbers, different funding sources.

It can be difficult to manage inventory of vaccines with the same lot number and different funding sources. One error can cause a cascading effect of errors between the two rows of vaccine.

ALERT IIS will always deduct from the funding source that matches the eligibility code entered. This means that when the same lot is in both private and state-supplied funding sources, ALERT IIS is not effective at tracking borrowing. Once one funding source runs out, immunizations with an eligibility code appropriate to that funding source will not deduct from the opposite funding source, they will report as (null) in the borrowed inventory column of the ad hoc report.

***TIP* Run the Ad Hoc report more frequently to find and fix errors earlier.**

Paying back with lots already in your ALERT IIS inventory

You can use one page in ALERT IIS to document repaying borrowed vaccine. When both the vaccine be used to pay back, and the borrowed dose exist in your inventory.

Step 1. Go to “Manage Inventory”, check both vaccines, click “Modify Quantity”.

| Select | Trade Name | Funding Source | Lot Number | Packaging | NDC | Inv On Hand | Active | Exp Date |
|-------------------------------------|----------------|----------------|------------|----------------------------|---------------|-------------|--------|------------|
| <input checked="" type="checkbox"/> | Engerix-B Peds | State | 9K74F | KINRIX 10X1 SRYINGES | 58160-0820-52 | 20 | Y | 10/27/2025 |
| <input checked="" type="checkbox"/> | Engerix-B Peds | Private | G09787 | HEP B-PF PREFILLED SYRINGE | 58160-0820-46 | 10 | Y | 06/30/2026 |

Step 2. Subtract a dose to pay back what was borrowed using the “Borrowed Out” reason. Add a dose to replace the borrowed dose using the “Borrowed In”* reason.

| Modify Quantity On Hand for Selected Site(s) | | | | | | |
|--|------------|----------------|-------------|------------|--------|----------------|
| Trade Name | Lot Number | Funding Source | Inv On Hand | Action | Amount | Reason |
| Engerix-B Peds | 9K74F | State | 20 | Subtract ▾ | 1 | Borrowed Out ▾ |
| Engerix-B Peds | G09787 | Private | 10 | Add ▾ | 1 | Borrowed In ▾ |

* **NOTE:** “Borrowed In” is only used in this circumstance. Using “Borrowed In” is not as common as creating a lot to repay into.

Step 3. Physically move doses in the refrigerator and change any labels



Step 4. Enter the payback on your Borrowing Log.

Paying back with lots NOT already in your ALERT IIS inventory

When you are repaying vaccine to a lot number that does not exist in your inventory, doses need to be subtracted and added in two different pages in ALERT IIS.

Step 1. Navigate to “Show Inventory”.

| Manage Inventory | |
|-----------------------------------|--------------------|
| Show Inventory for Sites.... | Show Inventory |
| Show Transactions for Sites.... | Show Transactions |
| Update inventory Alerts.... | Update Alert Prefs |
| Return to the Previous Screen.... | Cancel |

Step 2. Select the vaccine to be deducted and click “Modify Quantity”.

Manage Inventory

Add Inventory Add Inventory

Modify Quantity On Hand.... **Modify Quantity**

Add/Edit Inventory with 2D Barcode Scan... Barcode: Add / Edit Inventory

Show Transactions.... Show Transactions

Show Previous Counts.... Inventory Count Listing

Print Inventory Shown Below.... Print

Return to the Previous Screen.... Cancel

Funding Source: Both Show ☐ Active ☐ Inactive ☐ Non-Expired ☐ Expired

| Select | Trade Name | Funding Source | Lot Number | Packaging | NDC | Inv On Hand | Active | Exp Date |
|-------------------------------------|-----------------------|----------------|------------|---------------|---------------|-------------|--------|------------|
| <input type="checkbox"/> | Adacel | State | UI9831R | | | 19 | Y | 09/30/2020 |
| <input type="checkbox"/> | Fluzone Quad PF 0.5mL | Private | F012345 | 10X1 SYRINGES | 49281-0418-50 | 8 | Y | 09/01/2020 |
| <input checked="" type="checkbox"/> | Fluzone Quad PF 0.5mL | State | F044453 | 10X1 SYRINGES | 49281-0418-50 | 28 | Y | 09/01/2020 |
| <input type="checkbox"/> | Havrix-Peds 2 Dose | Private | 77D5K | 10X1 VIALS | 58160-0825-11 | 13 | Y | 11/01/2020 |
| <input type="checkbox"/> | Infanrix | Private | 0033PA4 | 10 X 1 VIALS | 58160-0840-11 | 180 | Y | 12/26/2027 |

Step 3. Modify the quantity using “Borrowed Out” as the reason and save.

Manage Inventory

Save Changes to Quantity On Hand for Selected Sites.... **Save**

Return to the Previous Screen.... Cancel

Modify Quantity On Hand for Selected Site(s)

| Trade Name | Lot Number | Funding Source | Inv On Hand | Action | Amount | Reason |
|-----------------------|------------|----------------|-------------|------------|--------|----------------|
| Fluzone Quad PF 0.5mL | F044453 | State | 28 | Subtract ▼ | 1 | Borrowed Out ▼ |

Step 4. Add the repaid dose as a new lot to the other funding source by clicking on “Add Inventory”. Fill out the blue fields and click save.

Manage Inventory

Add Inventory **Add Inventory**

Modify Quantity On Hand.... Modify Quantity

Add/Edit Inventory with 2D Barcode Scan... Barcode: Add / Edit Inventory

Show Transactions.... Show Transactions

Show Previous Counts.... Inventory Count Listing

Print Inventory Shown Below.... Print

Return to the Previous Screen.... Cancel



Add Vaccine Inventory Information

Site: EDU NW - PRIVATE CLINIC

Trade Name: Fluzone Quad PF 0.5mL ☐

Manufacturer: Sanofi Pasteur Inc. ☐

NDC:

Packaging:

Lot Number: F044453

Dose: .5

Expiration Date: 09/01/2020

Funding Source: Privately Purchas

Lot Active: Yes

Quantity on Hand: 1

Cost Per Dose (\$):

Step 5. Physically move doses in the refrigerator and change any labels.

